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ABSTRACT

This is a guide in outline form to assist practitioners in the planning, conduct, and evaluation of library workshops. Workshop planning groups are described and suggestions for membership are provided. Program planning includes needs assessment, preparation of workshop objectives, audience definition, choice of site and time, presentation techniques, selection of equipment and materials, selection of speakers, budget allocation, preparation of bibliographies and other handouts, preparation of displays, public relations arrangements, construction of the agenda, and registration procedures. Suggestions are given to insure smooth operation during the actual conduct of the workshop and evaluative procedures are described to sum up and close workshop activities. A source list of eight references is provided. (RAA)

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AN OUTLINE OF HOW TO PLAN A WORKSHOP

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I. THE WORKSHOP PLANNERS

The planning group which will plan your workshop may be:

A decentralized committee (geographically dispersed).
Must have coordinator to assign responsibilities to committee members.

A centralized group working together. Must have a coordinator.

An individual person - who will need assistance and input from the library staff.

In addition to members of the library and/or system staff the planning group might include:

Subject specialists.

Consultants from the State Library.

BARC staff member.

Librarians from other libraries or systems.

Members of the community.

I. THE WORKSHOP PLANNERS, continued

The planning group should begin planning three or four months before the workshop. They will want to divide responsibilities for:

Overall coordination

Program planning

Program Implementation/Overseeing arrangements

Publicity

Bibliographies and other handouts.

Displays

Evaluation

Follow-up

Helpful hints from those who have been there:

"When having a planning committee meeting ALWAYS HAVE AN AGENDA."

--Ohio Library Association. Workshop by design. 1975.

"INADEQUATE PLANNING AND PREPARATION RESULT IN MORE PROGRAM FAILURES THAN ANY OTHER SINGLE CAUSE."

--Barbara Conroy. Staff development and continuing education programs for library personnel: guidelines and criteria. WICHE, 1974.

II. PLANNING THE PROGRAM

A. ASSESS NEEDS

To decide on a topic the planning committee might do any or all of the following:

Look around the library for "problem" areas.

Talk informally with staff members--including persons who may participate in the workshop, and their supervisors.

Have a brainstorming session.

Send out a questionnaire to staff.

Survey professional literature.

"THE ASSESSMENT OF NEEDS SHOULD MEASURE THE DIFFERENCE BETWEEN WHAT IS GOING ON NOW AND WHAT SHOULD GO ON EITHER NOW OR IN THE FUTURE. 'NEEDS' CAN BE DEFINED AS THE GAP BETWEEN THE PRESENT LEVEL AND DESIRED (OR REQUIRED) LEVEL OF ABILITY OF INDIVIDUALS OR OF THE ORGANIZATION IN MEETING ITS RESPONSIBILITIES."

--Barbara Conroy. Staff development and continuing education programs for library personnel: guidelines and criteria. WICHE, 1974.

II. PLANNING THE PROGRAM, continued

A. ASSESS NEEDS, continued

Make a list of possible workshop topics.

Rank topics listed in priority order.

Decide which involve a learning need and might be handled through training. Non-training needs may be better handled by policy or procedure changes.

Decide which organization is the most appropriate to conduct the training for high priority learning needs--Is it yours or some other? If yours, can you handle the topic and training?

Decide whether having a workshop would be an appropriate way of handling the topic. Consider these factors:

Target audience: who needs to know what? how many people are involved?

Level and amount of material to be learned--try to keep topic narrow and manageable.

Commitment to topic--by potential audience and by library administration.

Consider alternatives to the workshop format:

Individual training or supervision (one-to-one basis)

Continuous on-the-job training

Institute

Formal coursework

11. PLANNING THE PROGRAM, continued

B. PREPARE WORKSHOP OBJECTIVESGoals vs. Objectives

Goals are statements of a desired, but not necessarily achievable condition.

Goals are: 1. Long-range 3. Timeless
2. Broad in scope 4. Not measurable

Objectives specify the results which the training is intended to achieve.

Qualities of meaningful objectives:

1. Important, not trivial.
2. Clear, concise, unambiguous, understandable, specific statements.
3. Stated in behavioral or performance terms.

Use concrete,
action verbs like:

write explain
choose compare
identify contrast
list submit

Avoid verbs that are vague, or describe actions
which cannot be observed - verbs like:

know grasp the significance of
understand analyze
learn develop
appreciate

4. Measurable. An observer should be able to clearly see when the objective has been fulfilled. It should state what evaluation standard is to be applied in appraising performance.
5. Include time frame, such as a target date for fulfilling the objective.
6. Realistic, feasible, attainable.
7. Controllable. The opportunity for fulfilling the objective must be reasonably within the control of the person running the workshop and of those attending.

EXAMPLES

GOAL: To understand the library's circulation system.

OBJECTIVE: At the end of the 1-day training program, the learner will be able to list & perform the 10 steps involved in checking out a book.

GOAL: To make information readily accessible to all members of the community.

OBJECTIVE: Library clientele will be increased by 500 new users during fiscal year 1979-80.

GOAL: To improve the economic status of San Francisco's citizens through provision of information services.

OBJECTIVE: Use of library by the business community will increase by 25% in a 12-month period.

II. PLANNING THE PROGRAM, continued

B. PREPARE WORKSHOP OBJECTIVES, continued

"Program objectives give direction to the efforts expended on the program--they are a blueprint for action. Sound objectives provide a firm basis for the decisions--program planning, setting policies and procedures, evaluating the outcomes--that will be necessary at each stage of the program development subsequent to this one. Objectives must be based on the needs discovered and must be in accord with the goals of the organization.

"THE PROCESS OF SETTING OBJECTIVES HELPS TO ORGANIZE THINKING, TO CHECK OUT ASSUMPTIONS AND TO ASSURE THAT THE VARIOUS ORGANIZATIONAL ELEMENTS ARE UNDERSTANDING AND WORKING TOGETHER TOWARD THE SAME GOAL. They are a prime means of communicating within and outside the organization about what is being attempted and achieved. They indicate the criteria by which the program can be evaluated--to what degree have we achieved our objectives?"

--Barbara Conroy. Staff development and continuing education programs for library personnel: guidelines and criteria. WICHE, 1974.

For additional information see Source List, p. 22.

Conroy, p.7-8.
Davis and McCallon, Ch.2.
Sheldon
Warncke, Ch.4.

II. PLANNING THE PROGRAM, continued

C. DEFINE YOUR AUDIENCE

Who is coming to your workshop? Once this is known, plan some means of communication between the planners and the people who will attend the workshop. Possible methods are:

1. Questionnaire distributed to all who will attend.
2. Preworkshop meeting with all or some of the people who will be attending the workshop.
3. Interview individuals (in person or by phone) who will be attending.

Some of the things you will want to find out are:

1. Do participants come from same or different working levels in the organization?
2. How varied is their understanding of, or experience with, the topic? Consider giving a pre-test--to learn what specific, related skills participants possess prior to workshop.
3. What teaching/learning methods do they like? Lecture? Role play? Small group discussions? etc.
4. What are their expectations? Why are they planning to attend the workshop?

You may want to ask all attendees to read designated materials before coming to the workshop (Note: If you choose this method, be sure all attendees will have access to the materials. Consider sending photocopies of articles.)

II. PLANNING THE PROGRAM, continued

D. PICK THE TIME AND PLACE

TIME: Find out what days and times are most convenient for participants.

Check for conflicting meetings, conferences, workshops, etc.

Avoid peak vacation times.

Check for major cultural and sporting events which might draw away potential workshop attendees.

PLACE: Try to choose a location that will be the most convenient for the majority of workshop participants.

Some things to consider when choosing a location:

Is it accessible via public transportation?

Is parking available? How close? Free, or fee?

Is there a place for lunch nearby?

When choosing a meeting room, consider:

How many people does the room hold?

Is the room comfortable and pleasant? Air-conditioned? If not, do the windows open? Street or interfering noises? Pillars that may obstruct view?

Can refreshments be served easily?

Is there a place for coats, hats, and umbrellas?

Where is the closest telephone? Where are the rest rooms?

Is there a place for comfortable, fast registration?

Are chairs movable? (For discussion groups and buzz sessions.)

Does it have tables? (For projectors, discussion groups, exhibits, panels, etc.)

Is there a stage, or raised platform? A lectern, with a light?

How are the acoustics?

Is there a sound system, a movie screen, and/or TV monitors (for video)? Where are the electrical outlets, and fuse boxes? Can windows be darkened for AV presentations?

Reserve the meeting room(s) AS EARLY AS POSSIBLE. Make arrangements for custodial services (special seating arrangements, placement of tables, accessibility to the room if building not usually open, etc.)

II. PLANNING THE PROGRAM, continued

E. SELECT PRESENTATION TECHNIQUES

Presentations made to a group

Lecture
 Debate
 Interview
 Panel
 Role play
 Demonstrations
 Skits
 Symposium
 Pantomime

Group learning

Discussion groups
 Role play
 Problem solving work sessions
 Case studies for discussion
 Demonstrations
 Brainstorming
 Non-verbal group project
 (Painting, drawing, constructing)

Audio visual presentations

Films
 Games
 Slides
 Filmstrips
 Video
 Audio tapes
 Records
 Multi-media
 Overhead projector
 Opaque projector
 Exhibits
 Posters
 Blackboard

And don't forget

Bibliographies and handouts
 Preworkshop reading suggestions

II. PLANNING THE PROGRAM, continued

F. PLAN FOR EQUIPMENT AND MATERIALS

Will you be using:

Films

Projector

Screen

Microphones

Videotapes

Television set and video playback equipment

Slides

Slide projector

Blackboard

Tables

Chairs

Maps

Lectern

Flip chart

Tape recorder (If you plan to do proceedings you will need to record the program.)

For whatever you will be using:

Reserve (projectors, chairs, etc.) early.

Order (films, tapes, slides) early.

Buy or make (maps, flip charts, games) early.

Find out who knows how to operate the machines.

Test equipment in advance to be sure it is working. Allow time for replacement or repair.

Are there adequate electrical outlets available, or will extension cords and 3-prong adaptors be needed?

Make sure there are spares--bulbs for projectors, etc.

See that there is chalk and an eraser for the blackboard.

Have paper, pens, masking tape, tacks available.

II. PLANNING THE PROGRAM, continued

G. SPEAKERS

These may be chosen from:

- Library personnel
- State Library personnel
- Local college and university staff people
- Experts in the field
- Issue-oriented community groups
- Library trustees and commissioners
- Business contacts
- Local or state government agencies
- Library schools

MAKE SURE THE PERSON IS A GOOD SPEAKER!

(By reputation or assessments of those who have heard her/him speak)

Contact the speaker early. In the first letter, or during the first phone call, the following points should be covered:

Who's giving the workshop.

Nature and purpose of the workshop.

Time, date and place of meeting.

Why s/he is considered an appropriate person for this job.

Background and number of people attending workshop.

Type of presentation expected and amount of time allotted.

When s/he should arrive and what time s/he is to speak.

Contact person, with address and phone number.

Honoraria and expenses.

Inquire about any audiovisual equipment, or other special arrangements, needed for presentation.

Can s/he bring a copy of her/his prepared speech for proceedings?

Does person mind being recorded on audiotape or videotape?

II. PLANNING THE PROGRAM, continued

G. SPEAKERS, continued

The planners will need to know from the speaker:

Title and length of talk or presentation.

Biographical and background information, and photograph, if needed.

Her/his travel arrangements. Should someone meet her/him at airport or other location?

About one week before the workshop a letter should be sent to the speaker which will include:

A reminder of time, date, and place of meeting; a map could be included.

Transportation and lodging arrangements.

Directions to meeting; or explanation of who will meet her/him, where and when.

A copy of the agenda.

Sometimes a phone call the day before can be made, if there is any doubt at all about the reliability of the speaker--past no-shows, etc. This should be done tactfully, of course.

II. PLANNING THE PROGRAM, continued

H. BUDGET

Consider the following items which are relevant to your workshop.
What will the costs be? Who will pay the costs?

Speakers' travel expenses and fees (or honoraria)

Printing and paper costs - for program, invitations or announcements, proceedings, etc.

Postage

Telephone/TWX

Name tags

Workshop kits

Meeting rooms

Lodging and meals for participants

Lodging and meals for staff and speakers

Equipment (and film, etc.) rental

Refreshment breaks during the workshop

Travel expenses for committee members and/or persons attending the workshop

Purchase of video or audio tapes

Display materials

AND DON'T FORGET THE ONE MAJOR EXPENSE - COST OF STAFF TIME!

If participants are to pay for the workshop, the Ohio Library Association suggests: *"After the amount of expense to be incurred has been totalled, prorate the cost by the number to attend the meeting, add 20% to determine registration fee."*

And BARC adds to this: It's good to make it clear that registration fees cannot be returned after a certain date. Remember, you will have to pay for all the meals, rooms, etc., which you have ordered.

II. PLANNING THE PROGRAM, continued

1. PREPARE BIBLIOGRAPHIES AND OTHER HANDOUTS

Decide 2-3 months before the workshop what lists, bibliographies, and other handouts will be distributed to participants.

Decide which people will be responsible for preparing items to be included in the workshop packets given to participants. If materials have to be ordered, who will do it? Some materials need to be ordered two or three months ahead of time.

Make sure permission is granted for any copyrighted materials used.

Set deadlines when bibliographies and other materials being produced must be ready for reproduction. Be very strict about this.

Remind those preparing lists and bibliographies to use a consistent bibliographic form.

Decide early who will collect and reproduce materials. This can be done in a centralized or decentralized manner. If it is centralized, the materials will be more uniform in appearance and workshop packets will have a more professional look.

Start final printing of materials as soon as they are ready. This will take time and can't all be done the last few days before the program.

Packets of materials should be completely collated THE DAY BEFORE THE WORKSHOP, or preferably earlier.

11. PLANNING THE PROGRAM, continued

J. PLAN FOR MATERIALS TO BE INCLUDED IN DISPLAYS

Collect those materials to be used in displays at least several days before the workshop. Display materials might include selected key items included in the bibliographies. These displays should be set up just before the workshop begins.

If you plan to make signs and posters to accompany your displays, allow plenty of time to produce them. Make sure signs are attractive and professional looking.

Make sure participants know which display materials are theirs for the taking and which materials are "reference only." Take special precautions to safeguard expensive, rare, fragile, and borrowed materials.

Assign specific people to set up and take down the displays.

II. PLANNING THE PROGRAM, continued

K. SEND OUT WORKSHOP ANNOUNCEMENTS

An announcement should be sent to potential attendees 4 to 6 weeks before the workshop is to be held. The announcement should include:

Name of agency giving/sponsoring the workshop.

Exact date(s) and time of workshop.

Location. Give complete address. Consider including a map.

Description of workshop. Be sure objectives are clearly and fully stated. State for whom it is being given and what topics will be covered.

If there is a deadline for registration, state this clearly. If there is a limit to the number of persons who can attend, state this clearly.

Registration information. Give telephone and/or teletype numbers, address, name of person doing registration.

Cost, if any, and how to make out check. Date after which refunds cannot be made.

Preliminary agenda is sometimes part of an announcement, but need not necessarily be included.

If workshop is scheduled for 2 days, is the program the same, or different, each day? Spell out any specific differences between the programs. These differences may be influential in which day participant chooses to attend.

II. PLANNING THE PROGRAM, continued

L. PLAN THE AGENDA

Divide the time by topic, speaker or activity.

- Roughton's Rules: #1 "People should not be made to sit for more than forty-five minutes, and absolutely not for more than one hour."
#2 "One hour and fifteen minutes is probably the minimum time that should be allowed for lunch."

Plan each segment. Try to have a variety of presentation techniques. Include time for audience reactions to presentations.

Print the agenda as late as possible, so last minute schedule changes can be made.

M. REGISTRATION PROCEDURES

One person should be responsible for coordinating registration.

If registration is handled by telephone, have a copy of the workshop announcement and sign up sheet at the phone so those answering calls can give information and take names. Record names, phone numbers and addresses of participants, especially if you plan to send out preworkshop information. Keep the list for your permanent records, particularly if you plan to contact attendees later.

If registration forms are mailed in, keep copies.

If possible, have typed name tags for attendees and speakers. Large type is preferred for legibility and easy sighting. Include name and place of work.

Assign 2 or 3 people to register attendees. Instruct them on procedures in advance, including what to tell people who arrive but have not preregistered. There may or may not be room for them.

III. THE DAY OF THE WORKSHOP

Registration Activities

Have 2 or 3 people to register attendees. Register people as quickly as possible. Have workshop packets ready and name tags made ahead of time.

Have extra blank name tags, paper and pencils.

Have extra workshop packets for people who want additional copies. If you run out, take names and send materials later.

If people who have not preregistered are allowed to stay, take their names and addresses if you want a permanent record of attendees.

General Housekeeping Activities

Inform the public service staff of topic, place and time of workshop. Give them a copy of workshop announcement. Post directional signs.

Be prepared. Everything should be ready when the workshop starts. As a rule of thumb, the room, all equipment, displays and materials should be ready 30-45 minutes before the start of the workshop.

Designate someone who will be free at all times and able to "run and get" and help cope with large and small emergencies.

Provide a place for people to hang coats, hats and umbrellas.

Announce smoking and nonsmoking rules to participants. Announce locations of restrooms.

Be aware if the room is too hot or too cold. Try to remedy the situation (sometimes one can't).

Start and end on time.

Keep to the time schedule listed on the agenda, if humanly possible.

Have someone watch the room when participants are at lunch, or absent for other reasons.

Activities Relating to the Speakers

Have someone assigned to meet the speaker: at the airport; at the door or the meeting room; for meal arrangements.

What to do if a speaker does not show up:

Show a movie

End early

Move up agenda

Have staff member speak

Give a longer break

Start a discussion

Workshop leader should have introductions of speakers written out ahead of time.

Have water and drinking glasses available for speakers.

Does speaker want questions during the speech? after the speech? written questions? Speaker should announce this in advance.

A. EVALUATION

Why evaluate?

To determine to what extent the workshop has met its planners' objectives.

To determine to what extent the workshop has met the objectives/expectations of the participants.

To find out how you can improve your next workshop. Evaluations of the first day may result in revisions of a presentation on the agenda for the next day.

As a courtesy, and often a requirement, funding agencies need/want program evaluations, e.g., LSCA guidelines require that all ongoing services of federal projects be evaluated by the users of the services.

Ways to evaluate:

Ask questions of the group before it disperses. It is a good idea to have a printed sheet of questions and to keep notes on responses.

Observe and note audience reaction, response, body language.

Distribute a printed questionnaire to each participant at the end of the program. It is best to collect these on the day of the workshop.

Send printed questionnaire to each participant after the workshop. This provides time for a considered response, but some forms will not be returned.

Conduct oral interviews, in person or by telephone, with those who attended.

For some workshops you may want follow-up evaluation 6 months or 1 year later. Questionnaires or oral interviews could be used.

IV. EVALUATION AND FOLLOW-UP, continued

A. EVALUATION, continued

In formulating evaluation questions for written questionnaires or oral interviews, remember the following:

1. Include both "yes and no" questions and "open-ended" questions.

"Yes and no" questions provide answers to specific questions, and are easy to tabulate. They take little time or effort to answer; therefore most participants will respond to them.

Example: Do you now feel able to use Moody's Industrials?
 ___yes ___no ___with some more study

"Open-ended" questions are difficult to correlate, but they allow people to express their reactions freely. They take time and effort to answer; therefore not everyone will respond to them. Useful and in-depth information can be gotten from well thought out answers to open-ended questions.

Examples: How will the information presented in this workshop be useful to you in your job?

What sections of the workshop were not particularly useful to you, and why?

2. Rating scales can provide useful information, are easily filled out by participants, and provide a visual and numeric picture.

Example: Please rate the speaker's overall organization and effectiveness. 10=most effective 1=least effective

10	9	8	7	6	5	4	3	2	1
most effective					least effective				

3. Try to measure efficiently. individual questions and questionnaire forms should be as short as possible, while asking for as much information as is needed. Attendees are more likely to fill out a terse one-page form than a rambling one of several pages.
4. Ask questions that relate to the objectives of the workshop.
5. Try to word your questions to assure constructive criticism, not just praise.

IV. EVALUATION AND FOLLOW-UP, continued

B. FOLLOW-UP

Write thank you notes to speakers and to those persons outside of the committee who helped in workshop planning and implementation.

Pay all bills.

Add your own notes to the master file--mistakes made, costs, suggestions if workshop is to be repeated, etc.

Proceedings. Will you need/want to do proceedings?

If so, who will edit them?

Who will print them?

Who will distribute them?

Will they be distributed free, or will there be a charge?

If there is a charge, who will handle orders and keep track of the money received? Decide whether to ask persons requesting proceedings for self-addressed, stamped envelope (specify size of envelope, amount of postage).

Will you advertise their availability to persons who did not attend the workshop?

Materials consulted in preparing this outline

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